

<b>Unit Title:</b>	<b>Deal with customers in writing or electronically</b>
Unit number	A13
Level:	3
Credit value:	6
Guided learning hours:	40

## Unit purpose and aim

Some customer service delivery involves communicating with a customer in a way that creates a permanent record either in writing or electronically. This form of communication carries risks and implications that are less likely to apply to a conversation held with a customer face to face or on the telephone. This unit is all about how written or electronic communication can be made effective and can contribute to excellent customer service.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p><b>The Learner will:</b></p> <p>1 Use written or electronic communication effectively</p>	<p><b>The Learner can:</b></p> <p>1.1 Operate equipment used to communicate in writing or electronically efficiently and effectively</p> <p>1.2 Ensure that the period of time between exchanges in writing or electronically represents excellent customer service</p> <p>1.3 Use language that is clear and concise</p> <p>1.4 Adapt their use of language to meet the individual needs of their customer</p> <p>1.5 Ensure that the style and tone of their written or electronic communication follows their organisation's guidelines and matches the service offer</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> <li>• How to operate relevant equipment for communication purposes</li> <li>• The importance of timescales when responding to customers</li> <li>• Appropriate use of language</li> <li>• Appropriate use of style and tone</li> </ul>
<p>2 Plan and send an effective written or electronic communication</p>	<p>2.1 Anticipate their customer's expectations taking account of any previous exchanges they may have had</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> <li>• The customer expectations</li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	<p>2.2 Assemble all the information they need to construct the communication</p> <p>2.3 Plan the objective of their communication</p> <p>2.4 Format their communication following their organisation's guidelines</p> <p>2.5 Open the communication positively to establish a rapport with their customer</p> <p>2.6 Ensure that their customer is aware of the purpose of the communication as early as possible</p> <p>2.7 Summarise the key point of the communication and any actions that they or their customer will take as a result</p>	<ul style="list-style-type: none"> <li>• The information required to construct appropriate communication responses</li> <li>• The importance of planning the communication</li> <li>• How to respond appropriately in writing to customers</li> </ul>
<p>3 Handle incoming written or electronic communications effectively</p>	<p>3.1 Read their customer's communication carefully to identify their precise reason for contacting you</p> <p>3.2 Identify what they are seeking as the outcome of the contact</p> <p>3.3 Identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each</p> <p>3.4 Choose the option that is most likely to lead to customer satisfaction within the service offer</p> <p>3.5 Summarise the outcome of the communication and any actions that they or their customer will take as a result</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> <li>• How to read communication from customers and extract the key points</li> <li>• How to identify relevant options prior to responding to the customer and consider the advantages and disadvantages of each option</li> <li>• How to select the best option for the customer</li> <li>• How to respond effectively to the customer</li> </ul>
<p>4 Know how to deal with customers in writing or electronically</p>	<p>4.1 Explain the importance of using clear and concise language</p> <p>4.2 Explain the additional significance and potential risks involved in committing a communication to a permanent record format</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> <li>• How to communicate effectively with customers to include: <ul style="list-style-type: none"> <li>- Language</li> <li>- Style and tone</li> </ul> </li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	4.3 Describe the effects of style and tone on the reader of a written or electronic communication 4.4 Explain the importance of adapting their language to meet the needs of customers who may find the communication hard to understand 4.5 Describe their organisation's guidelines and procedures relating to written and electronic communication 4.6 Explain how to operate equipment used for producing and sending written or electronic communications 4.7 Explain the importance of keeping their customer informed if there is likely to be any delay in responding to a communication 4.8 Explain the risks associated with the confidentiality of written or electronic communications	<ul style="list-style-type: none"> <li>- Keeping the customer informed</li> <li>• The risks involved in written communication to include:               <ul style="list-style-type: none"> <li>- Security of content</li> <li>- Committing themselves or their organisation</li> </ul> </li> <li>• Organisational guidelines and procedures for:               <ul style="list-style-type: none"> <li>- Written and electronic communication</li> <li>- Operation of equipment</li> </ul> </li> </ul>

## Assessment

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This qualification is internally assessed by centre staff and externally verified by OCR Assessors.

## Evidence requirements

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1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any evidence within this Unit.
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. Your communication with customers may be in writing, by text message, e-mail, internet (including social networking), intranet or by any other method you would be expected to use within your job role providing that there is a permanent record of your communication with your customers.

5. Your evidence must include examples of dealing with customers who:
  - a have routine expectations of your organisation's customer service
  - b have experienced difficulties when dealing with your organisation
  - c have made a specific request for information
  - d need to be informed of circumstances of which they are unaware.
6. The style and tone of your communication must follow organisational guidelines and you must provide evidence that you have taken account of:
  - a your job role and position in your organisation
  - b the personal style and preferences of your customer
  - c the conventions of the medium of communication you are using.
7. You must show that you have communicated with customers when:
  - a you have initiated the contact
  - b you are responding to a customer.

## Guidance on assessment and evidence requirements

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Please refer to the OCR Customer Service Centre Handbook available from the OCR website [www.ocr.org.uk](http://www.ocr.org.uk)

## National Occupational Standards (NOS) mapping/signposting

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This unit maps fully to competences outlined in the Customer Service 2010 (Institute of Customer Service) suite of National Occupational Standards.

## Additional information

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For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850) on the OCR website [www.ocr.org.uk](http://www.ocr.org.uk)